



State of North Carolina Office of Information Technology Services

Michael F. Easley, Governor

George Bakolia, State Chief Information Officer

May 4, 2005

Memorandum

To: Department CIOs, Chief Finance Officers, and Budget Officers
From: George Bakolia, State CIO
Subject: Information Sessions for Portfolio Management Initiative – May 23

Last week, I gave you an updated status of the statewide initiative to deploy an enterprise portfolio management software tool in state government. In that memo, dated April 27, 2005, I indicated a presentation would be offered to department CIOs and Chief Finance and Budget Officers to assist in agency preparation for the tool's deployment, including the selection of staff members for training.

The two briefings will be held on Monday, May 23rd at the ITS building. The first session is from 10:30 to noon, and the second is from 3:30 to 5:00 – content will be identical. The date and times were selected to provide the most flexibility for participants, considering the General Assembly is in session, and many departments have standing management meetings either in the morning or afternoon. In order to plan for the sessions and to facilitate entrance to the building through security, I request you RSVP to patricia.land@ncmail.net (981-5525) by 5:00 pm Wednesday May 18 regarding which session you will be attending, and the names of staff members who will be accompanying you.

This initiative addresses the following three areas of IT planning, budgeting, and management:

- Identifying, analyzing, and prioritizing potential IT investments – Assist departments in the process of developing and reviewing alternative IT investment needs and opportunities and preparing funding recommendations and requests.
- Approving and monitoring IT implementation projects – Streamline, simplify, and improve the effectiveness of agency-level and statewide approval and status reporting of IT projects.
- Analyze legacy (currently operating business systems) applications – Maintain a statewide database that is current and comprehensive and provide analytical capabilities to assist in the management of legacy applications, including forecasting of long-term cost liabilities.

Attendance of these sessions by both CIOs and CFOs and their key staff is encouraged. The processes of IT investment planning, budget preparation, and project management are joint business and technical responsibilities. I believe the portfolio management tool can help departments make better decisions and improve communications among agencies and oversight organizations, if we work together in this initiative.

CC: Members of the Executive Cabinet